

B2B SOFTWARE · PRODUCT-AWARE RESEARCH · OUTBOUND INFRASTRUCTURE

From Jira signal to product-aware outreach

980

LEADS ACTIVE ACROSS TEMPO'S
SMARTLEAD CAMPAIGNS AT ONE
SEPTEMBER 2025 PRODUCTION SNAPSHOT

Tempo sells a portfolio of planning, time-tracking, resource-management and portfolio-management products used in and around Jira.

That creates an unusual outbound problem. Knowing that a company uses Jira is useful, but it does not tell you which Tempo product is relevant. Knowing the product is not enough either. You still need a credible reason why that particular company might care about it now.

TCA helped build a system that connected those decisions. It identified Jira-qualified prospects, researched what each company was actually working on, matched those initiatives to relevant Tempo products and features, and used that reasoning to drive product-specific outreach.

01 — THE BUSINESS PROBLEM

Tempo does not sell one generic product

The campaign architecture included motions around:

TIMESHEETS

STRUCTURE

CAPACITY PLANNER

TEMPO PORTFOLIO

A company may use Jira. But should the conversation be about:

Time tracking?

Capacity planning?

Portfolio and project structure?

Something else in Tempo's portfolio?

Sending the same message to every Jira user would throw away much of the information available about the account.

02 — JIRA WAS A GATE, NOT THE MESSAGE

~~COULD THIS COMPANY BE RELEVANT?~~

What should we talk to this company about?

Early testing showed that only a minority of incoming prospects appeared to use Jira, so the team made Jira presence a hard gate for the relevant campaigns. That improved the population entering the more expensive research and personalization stages. But Jira presence only answered "Could this be relevant?" It did not answer "Why should this company care?"

30–40%

OF INCOMING LEADS PASSING THE JIRA-PRESENCE CHECK AND MOVING FROM CLAY TOWARD CAMPAIGN ACTIVATION, AT ONE OPERATING SNAPSHOT, THE REST DID NOT PROCEED.

Three Jira users, three different conversations

COMPANY A

Launching a major new product and trying to coordinate work across several teams.

COMPANY B

Expanding headcount and struggling with resource allocation.

COMPANY C

Improving project reporting and executive visibility.

All three may be legitimate Tempo prospects, but the most relevant product, feature and message may differ for each. The system needed to understand each company's current priorities before generating any outreach.

A decision layer before the email

01

Multi-source initiative research

The workflow gathered evidence about company initiatives from multiple sources. The objective was not a random personalization fact but substantive initiatives that might create a credible connection to something Tempo could help with.

COMPANY WEBSITES

THIRD-PARTY SOURCES

LINKEDIN

02

Initiative scoring

Several initiatives could surface for each company. Rather than take the first one found, the system evaluated each and selected the initiative with the strongest combination of commercial relevance and supporting evidence.

Product and feature fit — match to the assigned product's capabilities

Outcome alignment — could the product plausibly support it

Recency — a current priority over an old announcement

Evidence and confidence — enough support that the model need not invent

Category priority — a major product launch or operational program can outweigh a weakly related initiative

03

Product and feature matching

For product-specific campaigns, TCA created detailed product descriptions rather than giving the model a product name to improvise from. The research logic compared four inputs and selected the feature that best supported the connection. This was deliberately designed to reduce hallucination.

INITIATIVE

→

INTENDED OUTCOME

→

TEMPO PRODUCT

→

PRODUCT FEATURE

04

Portfolio reasoning for the general campaign

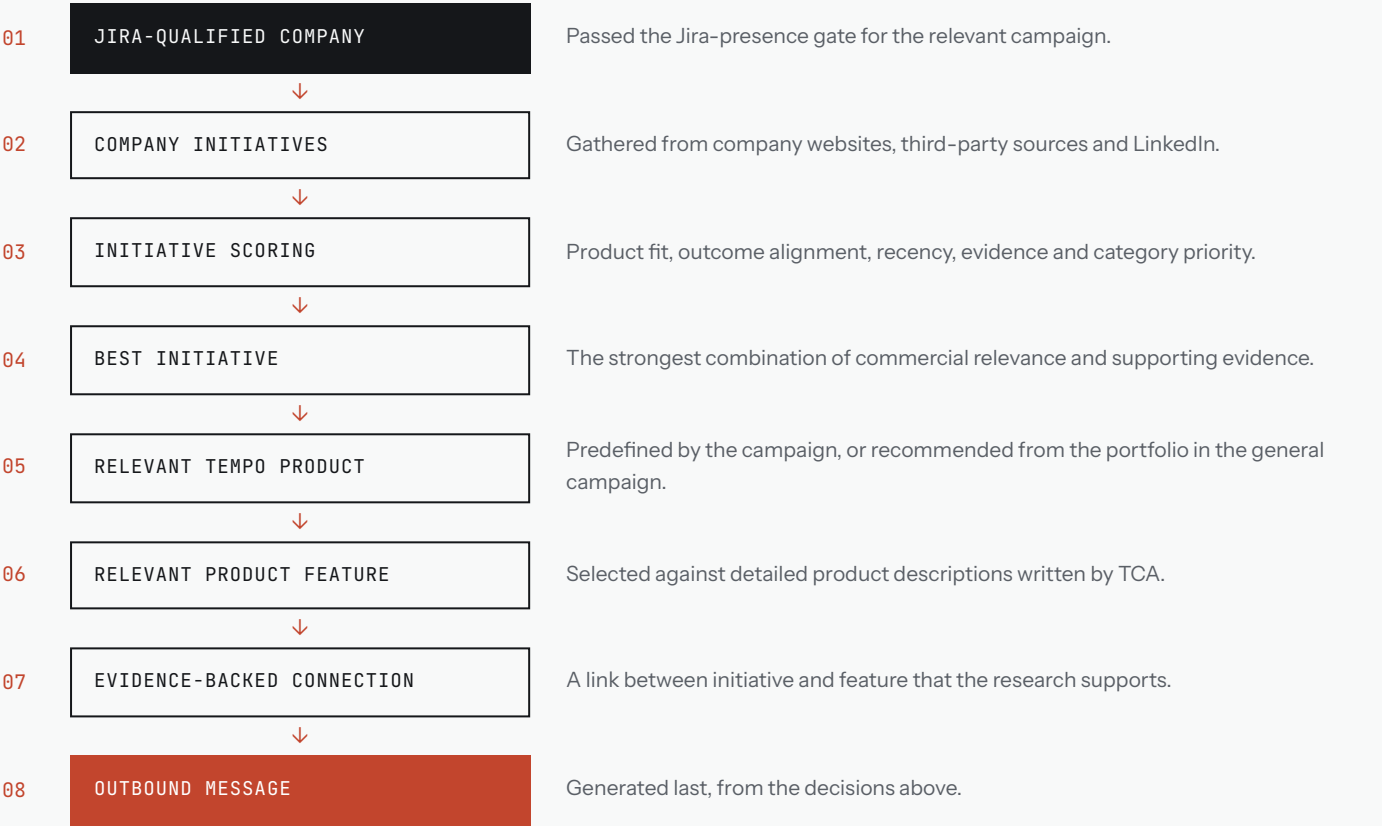
The general Tempo campaign had no predetermined product. A product-portfolio knowledge layer covering multiple Tempo offerings let the research prompt reason about what was happening at the company, what outcome it was pursuing, which one or two Tempo products were most relevant, and which capabilities supported that recommendation.

PERSONALIZED COPY GENERATION

Product recommendation + personalized copy generation

The email is the end of the research process, not the beginning

Only after these decisions were made did the system generate the personalization.



06 – PRODUCT-SPECIFIC CAMPAIGNS

PRODUCT KNOWN Timesheets	PRODUCT KNOWN Structure	PRODUCT KNOWN Capacity Planner	PRODUCT RECOMMENDED General portfolio
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In the Timesheets and Structure campaigns the product was known. The system researched the company, selected the initiative that best aligned with the product, then chose the most appropriate capability. Account research stayed company-specific while the product context stayed fixed.

Capacity Planner had its own campaign logic. At one production point, no newly processed Capacity Planner prospects passed the Jira requirement, so the campaign waited for qualified data.

That is what a qualification gate is supposed to do.

One pipeline, several campaign paths

The operating flow connected an upstream prospect source, Clay and Smartlead, and supported several simultaneous campaign paths rather than one generic sequence.

01 PROSPECT / INTENT SOURCE
02 SOURCE TABLE
03 JIRA PRESENCE
04 CAMPAIGN / PRODUCT CLASSIFICATION
05 COMPANY INITIATIVE RESEARCH
06 INITIATIVE SCORING
07 PRODUCT / FEATURE MATCH
08 PERSONALIZATION
09 CAMPAIGN ROUTING
GENERALTIMESHEETSTRUCTURE
10 SMARTLEAD
↻ CONTINUOUS PROCESSING OF NEW RECORDS

SIMPLIFIED. CAPACITY PLANNER ROUTED THROUGH THE SAME PATH ONCE JIRA-QUALIFIED PROSPECTS WERE AVAILABLE.

08 – GOING LIVE

24 SEP 2025	General, Timesheets and Structure campaigns live. Capacity Planner waiting for Jira-qualified prospects.
26 SEP 2025	End-to-end processing automated. New records flow through qualification and research into the appropriate campaign.

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leads active in Smartlead across the Tempo campaigns, September 2025 snapshot

30–40%

of the incoming prospect stream passing the Jira-presence requirement at the same point

The system was not designed to maximize the number of records sent to Smartlead. It deliberately reduced the flow when the evidence required it.

Hard decisions

- Make Jira presence a hard gate, even when most incoming leads fail it.
- Select one initiative per company instead of passing along everything found.
- Give the model detailed product descriptions, not just a product name.
- Let Capacity Planner wait for qualified data rather than launch on schedule.
- Have the general campaign recommend one or two products before writing.
- Move from manually advanced batches to continuous processing.

Operating the pipeline mattered

Tracing an apparent lead leak

The upstream source, Clay and Smartlead each represented the data differently. Date fields did not always mean the same thing, source counts could look inconsistent with downstream counts, and campaign categorization and processing logic changed the number of records at each stage. The team traced the full path from the upstream source into Clay and onward into Smartlead to explain where the differences came from.

A table can work perfectly while the system around it is misunderstood.

Adapting to changing data

Source-data formats changed and fields did not always arrive as expected. Formulas and classification logic were adjusted to the data actually arriving, keeping the system moving without a rebuild.

Documenting the build

TCA created a detailed walkthrough of the Clay implementation, covering the table, columns and processing steps, so the system could be understood and operated beyond the person who built it.

BUILDING VS OPERATING

A workflow is an implementation. A production system is an implementation that has encountered reality.

10 – WHAT AI ACTUALLY DID

AI was useful inside this system, but its role was constrained. It never received an empty prompt asking it to write a personalized email for a company. The surrounding research system supplied the evidence and commercial context.

Good AI personalization needs a decision system around the model.

AI HELPED

- Interpret company initiatives
- Evaluate fit
- Compare outcomes with product capabilities
- Rank competing initiatives
- Select relevant features
- Generate message inputs

11 – WHAT CHANGED

PROSPECT → EMAIL

A decision layer between prospect identification and outbound activation

IN THE RELEVANT ENVIRONMENT?	WHAT IS THE COMPANY WORKING ON?	WHICH INITIATIVE MATTERS MOST?	WHICH TEMPO PRODUCT AND FEATURE FIT?	WHAT EVIDENCE CAN WE SAFELY REFERENCE?	NOW WRITE THE MESSAGE
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The message is not personalized because its first line mentions something specific about the company. It is personalized because the reason for the conversation was selected using account-specific evidence.

Don't personalize the sentence. Personalize the reason.

Personalization is often treated as a writing problem: find a fact, put it in the first line, generate the rest with AI. Tempo needed more. The system TCA helped build decided who should proceed, what each company cared about, which product was relevant and what the outreach should actually be about.

13 – RESULTS · SEPTEMBER 2025

3

campaigns in live production:
General, Timesheets, Structure

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leads active in Smartlead at one
snapshot

30–40%

of incoming records passing Jira
presence

26 Sep

end-to-end processing workflow
automated

Right company	Right reason	Right people	Right message
Prospects met the campaign requirements, including Jira presence.	Initiatives were researched and evaluated against real Tempo capabilities.	Qualified contacts entered the relevant campaign motion.	Outreach was constructed only after those decisions.

TECHNOLOGY

CLAY

SMARTLEAD

UPSTREAM VISITOR / PROSPECT DATA

AI MODELS + CUSTOM PROMPTS

COMPANY WEBSITES

LINKEDIN

THIRD-PARTY RESEARCH SOURCES

LAYERS COVERED

JIRA DETECTION

QUALIFICATION

SEGMENTATION

COMPANY RESEARCH

INITIATIVE SCORING

PRODUCT + FEATURE MATCHING

COPY LOGIC

CAMPAIGN ROUTING

AUTOMATION

TROUBLESHOOTING

DOCUMENTATION

QUESTIONS ANSWERED BEFORE WRITING

What is happening at this company?

Which of those initiatives actually matters?

Which product could plausibly help?

Which capability creates the connection?

Only then: what should we say?

Need outbound to understand what you're selling?

TCA builds sales research and prospecting systems for established B2B companies. We connect qualification, account research, product logic, people, personalization and campaign infrastructure into a working operation, then run it against the real market and improve what production exposes.

SEE IF YOUR COMPANY IS A FIT →

THECLAYAGENCY.COM